Individual Assessment Center Activity for Financial Analyst

Instructions for using this template during Assessment Center

The purpose of this template is to provide a guide for using this Individual Exercise during an Assessment Center for hiring new candidates.

It provides a structured approach to evaluating candidates based on their technical and behavioral competencies required for the role.

Please follow the instructions below to ensure a fair and consistent evaluation of each candidate.

1. **Review the Technical and Behavioral Competency Requirements for the Role:** Please refer to Section 1 to review the technical and behavioral competency requirements for the role. This will help you understand the key skills, knowledge, and behaviors that are essential for the candidate to possess to be successful in the role.

2. **Use the Individual Exercise as Assessment Center Activity:** Please refer to Section 2 of this template to understand the individual exercise that you can use to assess the candidates. A case study has been used as an assessment tool for assessing an individual's competencies. The case study has been designed to assess specific competencies required for the role.

3. **Complete the Assessor Evaluation Form:** Please use the Assessor Evaluation Form provided towards the end of Section 2 to record your ratings and observations about the candidate during the specific assessment center activity. This form will help you capture your feedback on the candidate's performance during the exercises and their overall fit for the role. The answer key to the questions are provided in **Section 3** .The assessor can refer to these solution/ answers to the questions while evaluating the candidate

4. **Maintain Objectivity and Fairness:** Please ensure that you remain objective and fair throughout the assessment process. Avoid making assumptions or drawing conclusions based on factors that are not related to the candidate's performance. Also, ensure that you provide feedback based on the candidate's demonstrated behaviors and their ability to meet the defined competencies. rather than their personality or personal characteristics.

   Remember, the purpose of the individual assessment activities is to evaluate each candidate's performance independently, allowing for a comprehensive understanding of their capabilities and suitability for the role.

Section 1: Competencies Required For Financial Analyst

Technical Competency Requirements:

-

Behavioral Competency Requirements:

-

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Section 2: Case Study

Name of the Exercise: ""

Objective:

Competencies that will be assessed:

-

Instructions for the assessor:

-

Instructions for the participants:

-

List of Job Aids that will be required to perform the activity:

-

Elaborated Problem Statement:

Questions from the case study to assess the candidates

Assessment Center Activity Assessor Evaluation Form

Participant Name:	
Assessor Name:	
Date:	

Instructions: Please provide ratings and observations based on the participant's performance during the assessment center activity. Use the rating scale below and provide specific examples to support your ratings.

Rating Scale:
1 = Below Expectations
2 = Meets Expectations
3 = Exceeds Expectations

Evaluation Criteria	Weightage (%)	Rating	Observation

Overall Assessment:

Based on the above criteria, please provide an overall assessment of the participant's performance during the assessment center activity.

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Rating	

Observations:

Please provide any additional comments or feedback about the participant's performance during the assessment center activity.

Additional Comments:

Signature	
Assessor	
Date	

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Section 3: Case Study Solution/ Answer Key

Solutions for the Questions:

1.

2.

3.

4.

5.

6..

7.

8.

9.

10.

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